

Item 1 – Cover Page

**Part 2A of Form ADV
Brochure for:**



LOUISE GIVING TECHNOLOGIES, LLC

**2440 Junction Place
Suite 300
Boulder CO 80301
Phone: (267) 423-3458
<https://meetlouise.com/>**

March 31, 2022

This Brochure provides information about the qualifications and business practices of Louise Giving Technologies, LLC ("Louise"). If you have any questions about the contents of this Brochure, please contact Louise at the phone number and/or email listed above. The information in this Brochure has not been approved or verified by the United States Securities and Exchange Commission ("SEC") or by any state securities authority.

Louise is a registered investment adviser with the SEC. Registration as an investment adviser does not imply any certain level of skill or training.

Additional information about Louise is also available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 – Material Changes

On May 25, 2021, we filed the initial ADV Part 2A (“Brochure”). The following material changes have been made since the initial Brochure was filed:

1. Address change
2. Website domain name change
3. Addition of affiliated businesses

In addition, certain non-material changes have also been made to this Brochure. Consequently, we encourage you to read this Brochure in its entirety.

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Item 4 – Advisory Business

A. Description of the Advisory Firm

Louise Giving Technologies, LLC (“Louise”), a Delaware limited liability company, was formed on June 25, 2020. Louise is registered with the United States Securities and Exchange Commission (“SEC”) under Rule 203A-2(e) of the Investment Advisers Act of 1940, as amended (the “Advisers Act”), and therefore conducts business solely through an online advisory platform. TIFIN Capital Partners Fund, L.P. and TIFIN Group LLC (“TIFIN”) own Louise. Dr. Vinay Nair is the chief executive officer of TIFIN.

B. Types of Advisory Services

Louise provides advisory services to sponsors of donor-advised funds (“DAFs”). It is expected that, at least for some period of time, Louise’s only client will be a third-party sponsor to multiple DAFs, each of which has their own investment adviser (each, a “DAF Adviser”). In the future, Louise may decide to provide other services to additional clients, including other third-party DAF sponsors to offer DAFs on the Louise platform (collectively, the “Clients”).

Louise is a platform for supporting philanthropy that provides investment recommendations designed to align a DAF’s investment portfolio (or a portion thereof) with the values that drive the DAF’s charitable giving. Louise’s web-based platform helps facilitate charitable giving for DAFs by streamlining the identification of, and donation to, various 501(c)(3) charities. It is up to the DAF Adviser or the donor (“Donor”) to review and select what charities they would like to allocate the DAF’s charitable gifts towards.

Using the data from charitable donations made through Louise’s platform, Louise’s proprietary web-based platform develops a charitable giving profile based on the DAF’s donations to cause-specific charities. This giving profile is used to create personalized, model portfolios intended to reflect the DAF’s unique charitable goals. It is expected that initially only issue fund contributions made through the Louise platform will be used to generate giving profiles. In the future, Louise may consider additional data provided by the DAF Adviser, including historical charitable contributions made independently from Louise. Through its Clients, Louise seeks to enable DAFs to receive tailored investment recommendations and/or analysis of exchange-traded funds (“ETFs”) that align with their charitable goals.

Clients may grant DAF Advisers or other DAF representatives’ access to the Louise platform to generate charitable giving profiles for their associated DAF. Louise makes investment recommendations and allocation proposals to Clients that in turn may or may not ultimately be implemented by or on behalf of the DAF. In building personalized DAF portfolios for Clients, Louise assesses the historical charitable giving of each DAF to recommend ETFs that support the same goals as the DAF’s charitable giving (e.g., sustainable energy) and determine investment allocation among such ETFs.

As an internet adviser, Louise provides its investment advisory services to Clients solely through its website (available at <https://meetlouise.com/>). Clients will direct DAF Advisers or other DAF representatives to the website.

C. Client-Tailored Services and Client-Imposed Restrictions

Advisory services are tailored to assist Client's in achieving each DAF's charitable giving objectives and other aims identified by the Client or DAF Adviser. Louise currently expects to provide investment recommendations only with respect to ETFs, but may in the future provide investment recommendations of other types of securities.

D. Wrap Fee Programs

Louise does not participate in wrap fee programs.

E. Amounts Under Management

Louise has the following assets under management as of 12/31/2021:

Discretionary Amounts:	Non-Discretionary Amounts:	Total Firm Assets:
\$0	\$0	\$0

Item 5 – Fees and Compensation

A. Fee Schedule

The fees and compensation payable to Louise, and the timing of their payment, are negotiable and vary among its Clients depending on the nature of the non-discretionary services that the Client receives from Louise. Clients will generally be subject to a flat SaaS access fee ("Access Fee") that is billed to the Client in advance on either a monthly or annual basis and is assessed on a per-DAF basis. Clients will also generally be subject to a portfolio management fee (the "Management Fee") in exchange for advisory services. Management Fees range from approximately 20-50 basis points on assets under management of each underlying DAF. Management Fees can be charged monthly or quarterly in advance or in arrears as specified in each advisory agreement in place between Louise and each Client.

Louise does not currently receive any incentive-based compensation from Clients. Louise's compensation is negotiable, and Louise may, in its sole discretion, elect to waive or modify any fee or compensation with respect to any Client, without entitling any other Client to a waiver or modification.

B. Payment of Fees

Management Fees are calculated at the beginning of each month or quarter or following the end of each month or quarter. Clients are billed for and pay fees directly.

D. Prepayment of Fees

Louise does not expect Clients to prepay fees.

E. Outside Compensation for the Sale of Securities

Neither Louise nor its supervised persons accept compensation for the sale of securities or other investment products outside of its association with Louise.

Item 6 - Performance-Based Fees and Side-By-Side Management

As discussed in Item 5.A., Louise does not currently receive an incentive fee from its Clients.

Item 7 – Types of Clients

Louise's Clients are DAF sponsors. Louise does not impose a minimum account size. Clients are not required to have a certain amount of investment experience or sophistication. Generally, similar terms will apply to Clients, though certain Clients may have terms that differ or are more favorable than those for other Clients.

Item 8 – Methods of Analysis, Investment Strategies, Investment Tools, and Risk of Loss

A. Methods of Analysis and Investment Strategies

As described in Items 4 and 7, Louise provides Clients with investment recommendations using its proprietary web-based software. Louise's proprietary software uses data about the DAF's or Donor's charitable giving to various charities listed on the platform to develop personalized profiles and recommend investments composed of ETFs. Louise-generated recommendations seek to align the DAF's investment portfolio with its or its Donor's historical charitable giving and any other information provided by the Donor or DAF Adviser. Investment recommendations may be reviewed and approved by the DAF Adviser as set forth in each DAF's separate agreement with the DAF Adviser.

Louise uses its proprietary software to create personalized charitable profiles for the DAFs on behalf of Clients and to recommend investments based on algorithms that correspond to such charitable profiles. In making these recommendations, Louise's software considers the information that the Client has provided and that a DAF Adviser or Donor has provided through Louise's website based on their responses to the profile questionnaire and charitable giving history. The Clients must make their own investment decisions based on the recommendations provided by Louise.

Clients should be aware that:

- Louise uses its proprietary software to generate investment recommendations.
- These recommendations may evolve and allocations may be rebalanced overtime to reflect changes to the DAF's or Donor's charitable giving profile.
- The aim of the platform is to generate ETF recommendations that align with observed charitable giving patterns, not to make recommendations designed to yield the highest investment returns. The proprietary algorithm takes into account a variety of DAF- and market-specific factors and conditions.
- There will be no human intervention in decision-making. The Louise platform is systematic and rules-based.
- In making investment recommendations, Louise's software considers the information that the Client has provided and that a DAF Adviser or Donor has provided through Louise's website via responses to the profile questionnaire and charitable giving history. Louise does not use any other information about the Client DAF or Donor, such as other investments or

risk tolerances to make recommendations. Clients must make their own investment decisions based on the recommendations provided by Louise.

B. Investment Tools

Louise recommends ETFs and proposes allocation amounts based on the DAF's overall profile size and charitable giving to charities via Louise. Clients implement investment recommendations made by Louise by placing an order for the specific ETF within the Client's own brokerage account. Louise exercises no discretion in determining if and when trades are placed and does not place individual buy orders for specific securities.

C. Risks of Investments and Strategies Utilized

Investing in securities, including ETFs, involves risk of loss that Clients should be prepared to bear.

Investment and trading risk factors may include:

General Investment and Trading Risks. Clients may invest in securities and other financial instruments using strategies and investment techniques with significant risk characteristics.

Focus on Charitable Goals, Not Investment Returns. Louise's recommendations are designed to align a DAF's charitable giving with investment products that reflect the same or similar goals or industries. Louise's recommendations are not intended to be, nor are they expected to be, profit maximizing. As a result, DAFs implementing Louise recommendations may forego potentially lucrative investment opportunities to the extent Louise does not recommend such investments because the algorithm determines such investments are inconsistent with the DAF's charitable aims. Thus, a DAF's performance may be lower than other DAFs or accounts whose investment strategies are not subject to such considerations. There is of course no assurance that Louise's recommendations will actually result in, or contribute to, the achievement of any particular charitable goals.

Technology and Software Risks. Louise delivers its investment advisory services primarily through software accessible through Louise's website. All investment advice is provided through the internet and Clients' abilities to interact with humans regarding investment advice is accordingly limited. Additionally, such computer-generated recommendations, like all investment recommendations, may be subject to system error. No guarantee or representation is being made that the investment recommendations will be successful.

Louise rigorously designs, develops and tests its software extensively before putting such software into production with actual Clients and periodically monitors the behaviors of such software after its deployment. Notwithstanding this rigorous design, development, testing and monitoring, it is possible that such software may not always perform exactly as was intended. Technology and software malfunctions, programming inaccuracies, inadvertent system and human errors and similar circumstances could impair the performance of Louise's systems, which may negatively impact the quality and applicability of Louise's recommendations to Clients.

Exchange Traded Funds. ETFs represent shares of ownership in either funds or unit investment trusts that hold portfolios of common stocks, bonds or other instruments, which are designed to generally correspond to the price and yield performance of an underlying index. A primary risk

relating to ETFs is that the general level of stock or bond prices may decline, thus affecting the value of an equity or fixed income ETF, respectively. An ETF may also be adversely affected by the performance of the specific sector or group of industries on which it is based. Moreover, although ETFs are designed to provide investment results that generally correspond to the price and yield performance of their underlying indices, ETFs may not replicate the performance of the indices because of various sources of tracking error, including the expenses associated with ETFs and a number of other factors.

Common Stocks and Equity-Related Securities. Certain ETFs hold common stock. Prices of common stock react to the economic condition of the company that issued the security, industry and market conditions, and other factors which may fluctuate widely. Investments related to the value of stocks may rise and fall based on an issuer's actual and anticipated earnings, changes in management, the potential for takeovers and acquisitions, and other economic factors. Similarly, the value of other equity-related securities, including preferred stock, warrants, and options may also vary widely.

Small- and Mid-Cap Risks. Certain ETFs hold securities of small and mid-cap issuers. Securities of small-cap issuers may present greater risks than those of large-cap issuers. For example, some small- and mid-cap issuers often have limited product lines, markets, or financial resources. They may be subject to high volatility in revenues, expenses, and earnings. Their securities may be thinly traded, may be followed by fewer investment research analysts, and may be subject to wider price swings and thus may create a greater chance of loss than when investing in securities of larger-cap issuers. The market prices of securities of small- and mid-cap issuers generally are more sensitive to changes in earnings expectations, to corporate developments, and to market rumors than are the market prices of large-cap issuers.

Futures, Commodities, and Derivative Investments. Certain ETFs hold commodities, commodities contracts, and/or derivative instruments, including futures, options and swap agreements. The prices of commodities contracts and derivative instruments, including futures and options, are highly volatile. Payments made pursuant to swap agreements may also be highly volatile. Price movements of commodities, futures and options contracts, and payments pursuant to swap agreements are influenced by, among other things, interest rates, changing supply and demand relationships, trade, fiscal, monetary and exchange control programs and policies of governments, and national and international political and economic events and policies. The value of futures, options, and swap agreements also depends upon the price of the commodities underlying them. In addition, client assets are subject to the risk of the failure of any of the exchanges on which its positions trade or of its clearinghouses or counterparties.

Highly Volatile Markets. The prices of financial instruments can be highly volatile. Price movements of forward and other derivative contracts are influenced by, among other things, interest rates, changing supply and demand relationships, trade, fiscal, monetary and exchange control programs and policies of governments, and national and international political and economic events and policies. Clients are also subject to the risk of failure of any of the exchanges on which DAF positions trade or of its clearinghouses.

Non-U.S. Securities. Certain ETFs hold securities of non-U.S. issuers. Investments in securities of non-U.S. issuers pose a range of potential risks which could include expropriation, confiscatory taxation, imposition of withholding or other taxes on dividends, interest, capital gains or other income, political or social instability, illiquidity, price volatility, and market manipulation. In addition, less information may be available regarding securities of non-U.S. issuers, and non-U.S. issuers may

not be subject to accounting, auditing and financial reporting standards, and requirements comparable to or as uniform as those of U.S. issuers.

Emerging Markets. Certain ETFs hold securities of emerging market issues. In addition to the risks associated with investments outside of the United States, investments in emerging markets (i.e., the developing countries) may involve additional risks. Emerging markets generally are not as efficient as those in developed countries. In some cases, a market for the security may not exist locally, and transactions will need to be made on a neighboring exchange. Volume and liquidity levels in emerging markets are lower than in developed countries. When seeking to sell emerging market securities, little or no market may exist for the securities. In addition, issuers based in emerging markets are not generally subject to uniform accounting and financial reporting standards, practices, and requirements comparable to those applicable to issuers based in developed countries, thereby potentially increasing the risk of fraud or other deceptive practices.

Cybersecurity. Intentional cybersecurity breaches include unauthorized access to systems, networks, or devices; infection from computer viruses or other malicious software code; and attacks that shut down, disable, slow, or disrupt operations, processes, or website access or functionality. In addition, unintentional incidents can occur, such as the inadvertent release of confidential information (possibly resulting in the violation of applicable privacy laws). A cybersecurity breach could result in the loss or theft of customer data or funds, the inability to access electronic systems (“denial of services”), loss or theft of proprietary information or corporate data, physical damage to a computer or network system, or costs associated with system repairs. Such incidents could cause an investment fund, the advisor, a manager, or other service providers to incur regulatory penalties, reputational damage, additional compliance costs, or financial loss. Louise takes measures to protect sensitive client information and service disruptions, among other things, through cybersecurity preparedness and business continuity plans from intentional and unintentional cybersecurity threats.

Algorithmic Advice. The identification of ETFs and allocations consistent with a DAF’s charitable giving and other identified goals is difficult and involves a significant degree of uncertainty. The likelihood of identifying ETFs that fully align with a DAF’s charitable giving or identified goals is not assured and is dependent on inputs provided by external sources, including the DAF as well as the availability of ETFs that invest thematically in areas that align with the DAF’s charitable giving.

The foregoing list of risk factors does not purport to be a complete enumeration or explanation of the risks involved in an investment with Louise. Prospective Clients should read the entire Brochure as well as any other materials that may be provided by Louise, and consult with their own advisers prior to engaging Louise’s services.

Item 9 – Disciplinary Information

Louise and its management persons have not been a party to any legal or disciplinary events that would be material to a client’s or prospective client’s evaluation of its investment advisory business or the integrity of its management.

Item 10 – Other Financial Industry Activities and Affiliations

A. Registration as a Broker-Dealer or Broker-Dealer Representative

Neither Louise nor its management persons are registered as a broker-dealer or broker-dealer representative.

B. Registration as a Futures Commission Merchant, Commodity Pool Operator, or a Commodity Trading Advisor

Neither Louise nor its management persons are registered as futures commission merchant, commodity pool operator, or a commodity trading advisor.

C. Relationships Material to this Advisory Business and Possible Conflicts of Interest

Louise 's principal owner, TIFIN, is also the principal owner of TIFIN Capital Partners Management Co LLC, an exempt reporting adviser, as well as two registered investment advisers, TIFIN Grow LLC and Magnifi LLC.

Louise, Magnifi LLC and TIFIN Grow LLC have engaged an affiliated, offshore service provider that provides product development including code and application programming interfaces in addition to providing testing and quality control services. The cost and expenses associated with the service provider are borne by Louise and its affiliates, not by Clients.

Dr. Vinay Nair, the Chief Executive Officer of TIFIN, also has significant managerial duties for TIFIN Grow LLC and Magnifi LLC, both investment advisers that may provide sub-advisory and/or trade list delivery services, as well as investment advice and portfolio management services, to its clients, which may include Clients of Louise.

D. Selection of Other Advisors or Managers

Louise does not utilize or select other advisors or third-party managers.

Item 11 – Code of Ethics, Participation or Interest in Client Transactions and Personal Trading

A. Code of Ethics

Louise has adopted a Code of Ethics (the “Code”) pursuant to Rule 204A-of the Advisers Act. The Code governs the activities of each member, officer, director and employee of Louise (collectively, “Employees”). Louise holds its Employees to a high standard of integrity and business practices that reflects its fiduciary duty to the Client. In serving its Clients, Louise strives to avoid conflicts of interest or the appearance of conflicts of interest in connection with the personal trading activities of its Employees and Client securities transactions. When persons covered by the Code engage in personal securities transactions, they must adhere to the following general principles as well as to the Code’s specific provisions: (a) at all times the interests of the Client must be paramount; (b) personal transactions must be conducted consistent with the Code in manner that avoids any actual or potential conflict of interest; and (c) no inappropriate advantage should be taken of any position of trust and responsibility. Employees covered by the Code have certain trading restrictions and reporting obligations of their personal securities transactions. Each Employee is provided with a copy of the Code and must annually certify that they have received it and have complied with its provisions. In addition, any Employee who becomes aware of any potential violation of the Code is obligated to report the potential violation to the Chief Compliance Officer.

Louise will provide a copy of its Code of Ethics to Clients and prospective Clients upon request. Such a request may be made by submitting a written request to Louise at the address on the cover page to this Brochure.

B. Recommendations Involving Material Financial Interests

Neither Louise nor its related persons recommend to Clients, or buys or sells for Client accounts, securities in which Louise or a related person has a material financial interest.

C. Investing Personal Money in the Same Securities as Clients

From time to time Louise, its Employees and/or the related persons may also personally buy or sell the same ETFs that Louise’s Clients buy or sell, and it or they may own ETFs, or options on ETFs, that are subsequently bought for Clients because of Louise’s recommendations regarding a particular ETF. Louise’s policy as to such transactions is that neither Louise nor any of its Employees or related persons are to benefit from price movements that may be caused by transactions for Clients or otherwise. Louise addresses this conflict by requiring Employees to sign and adhere to Louise’s Code of Ethics and to report personal securities holdings and transactions to Louise.

D. Trading Securities At/Around the Same Time as Clients’ Securities

As discussed above, from time to time, Louise, its Employees, or related persons of Louise may buy or sell ETFs for themselves that Louise also recommends to a Client. Louise will always document any transactions that could be construed as conflicts of interest and will always transact Client business before the business of its Employees and/or related persons when similar securities are being bought or sold.

Item 12 – Brokerage Practices

A. Factors Used to Select or Recommending Broker-Dealers

Louise does not have discretion as to the placement of brokerage (and accordingly, the commission rates paid). The Client selects the custodian broker-dealer and Louise plays no role in selecting the broker-dealer.

1. Research and Other Soft Dollar Benefits

Louise does not have the authority to execute transactions for Clients and is not eligible to receive any research or other products or service other than execution from a broker-dealer or third-party in connection with Client securities transactions (“soft dollar benefits”). If in the future Louise obtains “soft-dollar” benefits, this Brochure will be appropriately amended.

2. Brokerage for Client Referrals

Louise does not select or recommend brokerage for Clients.

3. Directed Brokerage

Louise has no discretion over the brokers utilized by Clients. Louise has not negotiated the terms and conditions of the broker’s service terms (including, but not limited to, commission rates); in this case, Louise does not have responsibility for obtaining the best prices or particular commission rates with or through any such broker, and the client may not obtain rates as low as it might by following Louise’s recommendations.

B. Aggregating Trading for Multiple Client Accounts

As noted above, Louise does not buy or sell specific securities for any Clients, and as such, Louise does not combine orders on behalf of one Client account with orders for other Client accounts for which it or its principals have trading authority, or in which it or its principals have an economic interest.

Item 13 – Review of Accounts

A. Frequency and Nature of Periodic Review and Who Makes Those Reviews

Louise’s platform is designed to provide Clients with continuous access to account information. Through Louise’s website, Clients and DAF Advisers can login to view their own or their client’s as applicable, personalized profiles and investment recommendations.

Louise’s investment recommendations are based on the historical charitable giving of the DAF which has been provided through the platform and other information submitted by the Client through the profile questionnaire on Louise’s website. Louise frequently adjusts the investment recommendations as the DAF’s charitable giving changes.

B. Factors That Will Trigger a Non-Periodic Review of Client Accounts

None. Clients should be aware that DAF positions are not actively monitored directly by investment advisory personnel.

C. Content and Frequency of Regular Reports

Louise will not itself provide any reports concerning Clients. Clients receive account statements from their custodians.

Item 14 – Client Referrals and Other Compensation

A. Economic Benefits Provided by Third Parties

Louise does not receive any economic benefit, directly or indirectly from any third party for recommendations rendered to the Client.

B. Compensation to Non-Advisory Personnel for Client Referrals

Currently, neither Louise nor its related persons directly or indirectly compensate any person who is not advisory personnel for Client referrals. Louise and its affiliates may refer Clients to each other; however, no compensation will be paid for any such referrals. If in the future Louise enters into such arrangements, this Brochure will be appropriately amended.

Item 15 – Custody

Louise does not have “custody” of Client assets. Client assets will be maintained with one or more banks, brokerage firms, and/or other qualified custodians that serve as custodians of the funds and/or securities of the Clients. Clients will receive account statements from their custodians. Clients are encouraged to carefully review the account statements provided by their custodians and to compare these to any reports provided by Louise.

Item 16 – Investment Discretion

Louise does not have discretionary authority to determine the securities to be bought or sold, amount of securities to be bought or sold, broker-dealer to be used for the purchase or sale of securities, and commission rates to be paid to a broker-dealer in a Client’s account.

Item 17 – Voting Client Securities

Louise will not have authority to vote proxies on behalf of Clients.

Item 18 – Financial Information

A. Balance Sheet

Louise does not require nor solicit prepayment of more than \$1,200 in fees per client, six months or more in advance and therefore does not need to include a balance sheet with this Brochure.

B. Financial Condition

At this time, neither Louise, nor its management persons have any financial conditions that are likely to reasonably impair its ability to meet contractual commitments to its Clients.

C. Bankruptcy Petitions in Previous Years

Louise has not been the subject of a bankruptcy petition in the last ten years.